GIT - Intertransfer Module

For more information on the Intertransfers Module see Appendix L.

OVERVIEW

In 1993 intertransfers contained a single question about all inheritances ever
received. In addition to this there was a series of questions about money received
from parents and others. There was an extensive series of questions regarding
transfers to children in this round including each of six categories of reasons for
transfers, and information about the three children to whom the respondent gave the
most money for this reason was recorded. Also in this section were transfers to
parents or in-laws, and transfers to others.

In the 2003 wave, intertransfers covered basic information on the largest lifetime
inheritance valued at $10,000 or more. We obtained details of inheritance for
respondents in the RETFLAG=1 sample (a random 50%) and people with an inheritance
valued at $100,000 or more. The intertransfers section queried from whom the
respondents received this money, and, if the inheritance was from a parent or
grandparent, whether it was divided equally among the respondent and their siblings.
The inheritance section covers questions aimed at these same respondents and their
second largest lifetime inheritance as well. Children exist in this last wave of
intertranserfers as a separate source of transfers.These transfers are currently
tied to specific entities in the children's roster.

An unfolding framework was used to question respondents about transfers to parents
and in-laws, children, and others. This new approach has implications for the way
data is collected. In 1992, six separate transfers to each child (one transfer for
each purpose) could have conceivably been collected. In 2003, the instrument looped
through children rather than through reasons. For each child, the section covers
the total amount transferred and the primary reason for the transfers, as well as
information on the largest gift, and whether the child would have been able to
borrow that sum elsewhere.

Added questions about the respondents' intended distribution of inter vivos gifts
among their children were included in the 2003 wave. A benefit to the section is
that these gifts are tied directly to entities from the children's roster within the
interview. Transfers to parents and others remain largely the same. For transfers
to "others" who turn out to be grandchildren, we ascertained information on which of
the respondent's own children was that child's parent.

Charitable donations questions from 1992 remain in 2003.

Unfolding brackets followed questions asking for dollar amounts in this section.
Associated with these items are four variables (identified by the eight characters
of the variable name) detailing the information collected in the bracketing
sequence. The character "b" is associated with a summary variable, "u" and "l"
denote the upper and lower bounds and "e" indicates the entry point into the
bracketing sequence.

During the interview, interviewers had a chance to leave notes with additional
information obtained from the respondents. The WLS staff reviewed and processed
these notes using a standardized set of decision rules for each section. In many
cases processing the notes resulted in changes to the coded responses which created
inconsistencies in the skip pattern of the CASES instrument. While we put
considerable effort into adjusting such discrepancies, we could not eliminate them
all. Occasionally, notes indicated problematic cases due to the lack of specific
information or, conversely, cases that contained extra information that was

important enough to retain. In such instances we created a flag, identified by the character "f" and attached it to the variable name, for the affected variable.

BRIEF VARIABLE DESCRIPTIONS

GQ100R1-GQ110R2 Inheritances
GQ200R-GQ305R3   Money received by respondent and spouse
GQ400R-GQ605R3   Money given by respondent and spouse
GQ700R-GQ701R   Charitable contributions

PROBLEMS

   Problems occurred in the coding of the Cases instrument and during the interviewing process. Problems with the instrument that affected codes for analysis variables are included as notes with the affected variables in the codebook. Details regarding the problems with individual cases which occurred during the interviewing process can be found in the *private* subcor 888a.

PEOPLE

   Liz Rainwater, Kamil Sicinski, Wes Taylor - Coding of Sibling module for Cases instrument.

   Kamil Sicinski- Checking of notes, making corrections, coding/supervising coding of open-ended responses, and writing the COR.

   Liz Rainwater, Kamil Sicinski - Writing code to create analysis variables, making corrections to raw data, and writing the COR.